



Free Training Transcript:
Fixing “Incorrect” Sorts

Welcome to this video on Fixing “Incorrect” Sorts. You can download the Exercise workbook to follow along in your own copy of Tableau.

“Incorrect” Sorts

Sometimes our sorts look wrong. Here, we have a bar chart of Profit by Customer ID, with customers broken out by Ship Mode. If we do a quick sort on the axis – what’s going on? It looks like our sort is incorrect. If we right click on the pill where we see this sort icon, Customer ID, and click sort, we see what’s actually happening. We sorting Customer ID by Profit. That’s it. Ship Mode does not factor into the sort at all.

If we keep only a bar that appears to be incorrectly sorted, we’ll see this customer has orders with multiple ship modes. Our original sort was being done on customers by overall sum of Profits, despite the fact those Profits may span Ship Modes. So inside of the First Class pane, this customer should not have been ranked so highly, but when we take into account the other orders in a different ship mode, they are highly profitable customer.

If what we intend to do is sort the customers independently per Ship Mode, we need to tell Tableau exactly how to sort by using a table calculation.

Using RANK

First, right click in the data pane and select “Create Calculated Field”. We’ll name it “Rank”, and then we’ll use the Rank function. Now we have to say what we want to rank, and how. We want to see our bars arranged by profit, so let’s drag that field in, and we need to have aggregation around that Measure, we’ll use SUM, and close the parentheses. We can also set how the rank should be sorted, we’ll choose ‘desc’. And click OK.

An important step is to convert this field to discrete – by right clicking and selecting “Convert to Discrete”. Now, we’ll bring that field into our view. We see that we have a rank, 1,2,3,4 as expected. But what we actually want to do is move the rank between ship mode and customer ID because we want to first consider Ship Mode, then rank by profit. We can see that the ranks here are 5, 9, 16... those “missing” ranks are just in other ship modes. To make the ranks independent per ship mode, we need to right click and set the compute using to pane down. Now our sorts look correct.

If we don’t want to see the rank in the view, we can right click on the pill on the rows shelf and uncheck Show header. Now our view has the sort we intended and looks tidy!

Conclusion

Thank you for watching this video on fixing what look like incorrect sorts. I hope this helps explain some of why Tableau is doing what it does, and invite you to continue with the On-Demand Training videos to learn more about using Tableau.